

## Choice Training 7-2: Exporting Pupil Data

### 1. 7-2 Exporting Data

#### 1.1 Training 7-2:



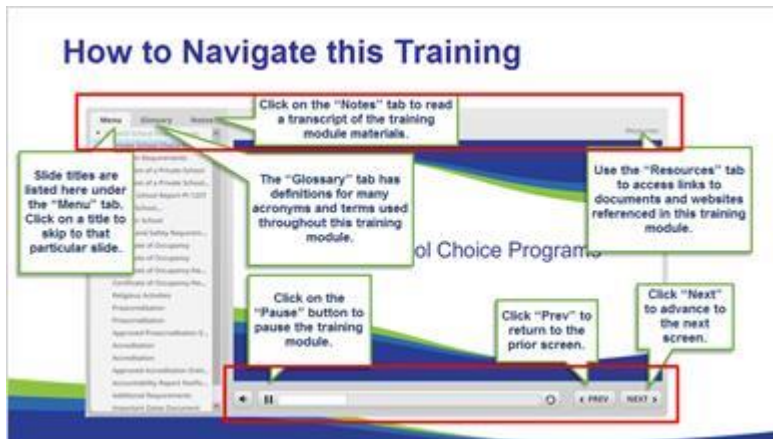
#### Notes:

Welcome to the Wisconsin Department of Public Instruction's training module on the Private School Choice Programs. We will refer to the Private School Choice Programs as "Choice" or "Choice program" throughout this training. The Choice program is governed by Wis. Stat. §§ 119.23 and 118.60, as well as Wis. Admin. Codes ch. PI 35 and 48. Provisions of this training module are subject to statutory and rule changes.

This training module will discuss how to export student data to Excel.



## 7-2.2 How to Navigate this Training Module



### Notes:

Before we start, here are some tips and tools you may wish to use when viewing this training.

When listening to this training please note the buttons at the top of the training screen. Titles to all of the slides in this training are listed under the “Menu” tab on the top left of the training screen. You may watch the training in its entirety, or you may skip to a specific slide by clicking on the title of a particular slide.

Acronyms and terms that are used throughout this training are defined under the “Glossary” tab on the upper left side of the training screen. If you have any questions about a particular acronym or term that is used in this training, click on the “Glossary” tab to read the definition of that acronym or term.

The “Notes” tab has a transcript of the training materials as they are presented. If you wish to read along with the training, please click the “Notes” tab on the upper left side of the training screen.

We have also posted resources related to this training which can be found under the “Resources” link on the upper right hand side of the training screen.

Next please note the buttons at the bottom of the training screen. If you want to pause on or during a specific slide, please hit the “Pause” button. Clicking the “Prev” button will allow you to return to the previous slide and clicking the “Next” button will allow you to advance to the next slide, if you wish to advance sooner than the auto-timing.



### 7-2.3 Accessing the Export to Excel in OAS



#### Notes:

The Online Application System, or OAS, includes an Export to Excel function. This allows the school to download various student data. For example, it can be used to download the student's contact information so the school can send letters of acceptance or denial or to determine which students were included on a pupil count report.

In order to access this listing, the administrator or an authorized designee must log into the OAS and select "Export to Excel" under "Applications" on the left menu bar.



## 7-2.4 Select Data to Include

**Select Data to Include**

Private School Choice Programs - Application Data - Select Fields to Export

Select Data to Include:

School year: 2016 - 2017

School: All Schools

Application Status:

☐ Not yet verified ☐ Ineligible per OAS ☐ Duplicate App

☐ Submitted ☐ Ineligible in Semester 1 ☐ Expired After 60 Days

☐ Ineligible in Semester 2 ☐ Parent No Show

☐ Ineligible in Both Semesters

- You must select the school year you would like to download data for.
- Check which application statuses should be included.

### Notes:

When selecting the data that should be exported, first select the school year that you would like the data for. Next, check which application statuses you would like included in the report. Generally, it is best to select “Any Status” so all applications in OAS are included.

If you are using the report to identify applications that need to be verified, you could select “Not Yet Verified” only.

If you are trying to determine which applications were counted on one of the count dates, include applications with a status of Submitted, Ineligible in Semester 1, and Ineligible in Semester 2. Students that are ineligible in semester 1 could be counted in semester 2 and students that are ineligible in semester 2 could be counted in semester 1, so it is important to include them in the export if you would like the list of all students that were counted on a particular count date.

## 7-2.5 Groups

### Notes:

In the select columns section of the export to Excel screen, you will need to identify what information you would like included in the report. The information is included in groups. Certain groups will not initially show all of the information in that group. To see the information available in a particular group, press the plus sign next to the title.

## 7-2.6 Selecting Fields for the Export

### Notes:



The export will, by default, include the school name and the student's first name, middle initial, and last name. You must add a check box to any other fields you would like to include in the export. If you check the box next to the title, all of the fields in that group will be selected.

### 7-2.7 Application Group



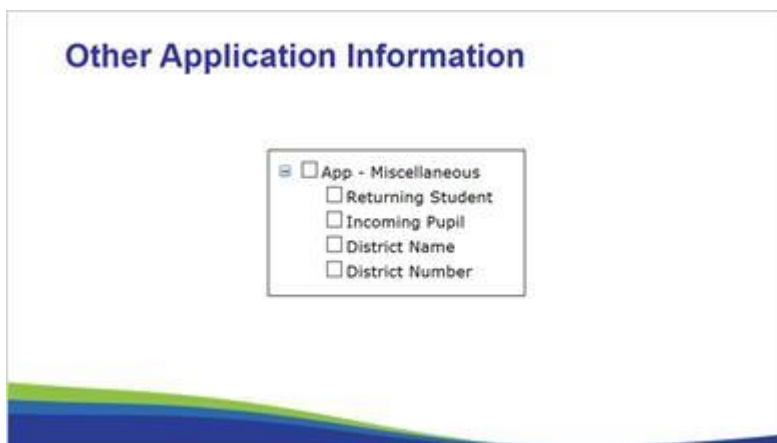
#### Notes:

The application group includes the application ID, the date the application was received, the date the application was submitted, the status of the application, and an indication of if the student was on the waiting list or not.

The application ID is the student specific number used for identification purposes by the DPI and the school's auditor. Date app received is the date the school received the application. Date submitted is the date the school submitted the application in OAS. The status is the status of the application.

Waiting list identifies students included in the school maintained waiting list for the MPCP and RPCP with a "Y." It does not include students on the WPCP waiting list, which is maintained by DPI.

## 7-2.8 Other Application Information



**Other Application Information**

- ☐ App - Miscellaneous
  - ☐ Returning Student
  - ☐ Incoming Pupil
  - ☐ District Name
  - ☐ District Number

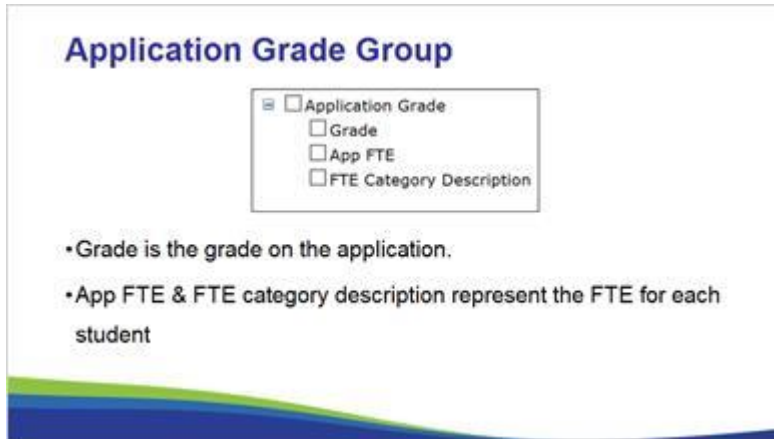
### Notes:

The app-miscellaneous group includes fields for returning students, incoming pupils, the district name, and the district number. The returning student information indicates if the application is a new or continuing student application. The column label when exported will read, “IS\_RETURNING\_STUDENT”. “N” is indicated for new applications and a “Y” is included for continuing student applications.

Incoming pupil is a designation that is only applicable for the RPCP and WPCP. It denotes whether or not the student participated in the RPCP or WPCP prior to the 2015-16 school year. The column will indicate “Y” if the student is an incoming pupil or “N” if the student is not an incoming pupil. Schools are required to determine the current address and school district for incoming pupils participating in the WPCP who were counted on the 3<sup>rd</sup> Friday in September Pupil Count Report. Therefore, the school may find it helpful to use this field to identify the students who will require an address reverification.

Finally, the district name and number identify the district where the student resides.

### **7-2.9 Application Grade Group**



#### **Notes:**

The application grade group includes the student's grade on the application, the full time equivalent, or FTE, on the application, and a description of the FTE category. Students in grades one to twelve are 1.0 FTE. The FTE for students in grades K4 and K5 can vary depending on what type of program the school identifies it will have in the Intent to Participate. Further information on how the FTE is determined is available in the Payments and Count Reports training.

The application grade updates to the most current grade for the student. For example, if the student applied to fourth grade but was identified as being in third grade in the 3<sup>rd</sup> Friday in September Pupil Count Report, the application grade will be third grade.



### **7-2.10 September 1st Enrollment Group**



**September 1<sup>st</sup> Enrollment Group**

- ☐ Sept 1st Enrollment
  - ☐ Grade
  - ☐ FTE Category Description
  - ☐ Counted Final Headcount
  - ☐ Counted Final FTE

#### **Notes:**

The Sept 1<sup>st</sup> enrollment group provides the data from the September 1 Pupil Count Report. It includes the grade, FTE category description, headcount and FTE.

### **7-2.11 3rd Friday in September & 2nd Friday in January Group**



**3<sup>rd</sup> Friday in September & 2<sup>nd</sup> Friday in January Group**

<input type="checkbox"/> 3 <sup>rd</sup> Friday in September <ul style="list-style-type: none"> <li><input type="checkbox"/> Grade</li> <li><input type="checkbox"/> FTE Category Description</li> <li><input type="checkbox"/> Present on Count Day</li> <li><input type="checkbox"/> Present Before</li> <li><input type="checkbox"/> Present After</li> <li><input type="checkbox"/> Counted By School Headcount</li> <li><input type="checkbox"/> Counted By School FTE</li> <li><input type="checkbox"/> Counted Final Headcount</li> <li><input type="checkbox"/> Counted Final FTE</li> </ul>	<input type="checkbox"/> 2 <sup>nd</sup> Friday in January <ul style="list-style-type: none"> <li><input type="checkbox"/> Grade</li> <li><input type="checkbox"/> FTE Category Description</li> <li><input type="checkbox"/> Present on Count Day</li> <li><input type="checkbox"/> Present Before</li> <li><input type="checkbox"/> Present After</li> <li><input type="checkbox"/> Counted By School Headcount</li> <li><input type="checkbox"/> Counted By School FTE</li> <li><input type="checkbox"/> Counted Final Headcount</li> <li><input type="checkbox"/> Counted Final FTE</li> </ul>
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- Represents the data from the 3<sup>rd</sup> Friday in September and 2<sup>nd</sup> Friday in January Pupil Count Reports.
- Present on count date, present before, present after, counted by school headcount, and counted by school FTE represent the original data included in the count report by the school.
- Grade, FTE category description, counted final headcount, and counted final FTE include any changes by DPI.

#### **Notes:**

The 3<sup>rd</sup> Friday in September and 2<sup>nd</sup> Friday in January groups provide the information on



the two count reports. These groups provide the information that was originally submitted by the school in the count reports and the current data.

The originally submitted data includes if the student was identified as being present on the count date, present before the count date, or present after the count date. In addition, the counted by school headcount and FTE will indicate if the student met either of the count requirements per the pupil count report, either being present on the count date or being present any day before and any day after the count date.

The remaining fields will update for any changes in the count data. This includes the grade that the student was in for the count date and the FTE category description. The counted final headcount and FTE incorporate any changes made by the DPI due to students identified as ineligible that were counted or students that weren't counted that need to be added to the count.

### **7-2.12 Contact Info, 1st Parent Data/Family, & 2nd Parent Groups**

**Contact Info, 1st Parent Data/Family, & 2nd Parent Groups**

Contact Info	1st Parent Data / Family	2nd Parent Data
<input type="checkbox"/> Phone	<input type="checkbox"/> Parent Full Name (Doe Sr, John Q)	<input type="checkbox"/> 2nd Parent Full Name (Doe Sr, John Q)
<input type="checkbox"/> Address	<input type="checkbox"/> Parent Full Name (John Q Doe Sr)	<input type="checkbox"/> 2nd Parent Full Name (John Q Doe Sr)
<input type="checkbox"/> City	<input type="checkbox"/> Parent First Name	<input type="checkbox"/> 2nd Parent First Name
<input type="checkbox"/> State	<input type="checkbox"/> Parent Last Name	<input type="checkbox"/> 2nd Parent Last Name
<input type="checkbox"/> Zip	<input type="checkbox"/> Parent Suffix	<input type="checkbox"/> 2nd Parent Suffix
<input type="checkbox"/> Email	<input type="checkbox"/> Parents Are Married	
	<input type="checkbox"/> Family Size	
	<input type="checkbox"/> Family ID	

#### **Notes:**

The contact info group includes the phone number, address, and email address for the applicant.

The 1<sup>st</sup> parent data/family and 2<sup>nd</sup> parent data fields include the name and information

about the parents or guardians on the application. The fields allow for the user to determine what format they prefer for the parent's names. These groups also provide information on if the parents are married and the family size if the application is for a new student.

The school may find the information in these groups useful for creating the letters of acceptance or denial for the students.

The 1<sup>st</sup> parent data/family group also includes the Family ID. Each family application is assigned a Family ID. This number is identified by the auditor for any students in the Enrollment Audits. Generally the school will not need this number.

### **7-2.13 Race/Ethnicity Group**



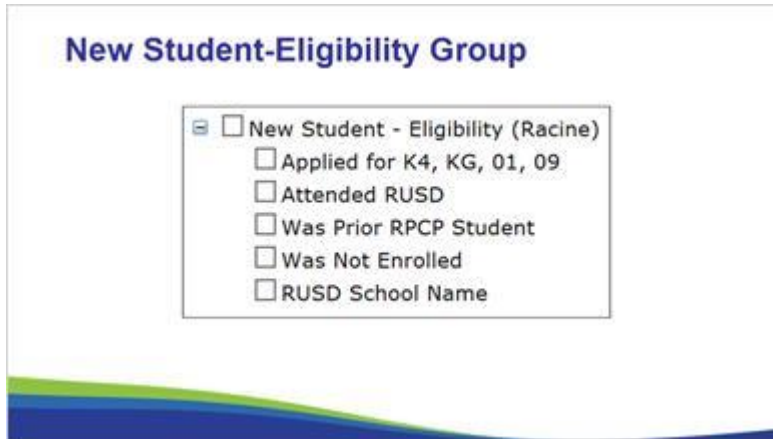
**Race/Ethnicity Group**

- ☐ Race/Ethnicity
  - ☐ Hispanic or Latino
  - ☐ American Indian or Alaskan Native
  - ☐ Asian
  - ☐ Black or African American
  - ☐ Native Hawaiian or Other Pacific Islander
  - ☐ White

#### **Notes:**

The race/ethnicity group indicates what race or ethnicity was identified on the application. The column indicates a “Y” if it was checked on the application and a “N” if it was not checked on the application.

### 7-2.14 New Student-Eligibility Group



**New Student-Eligibility Group**

☒ ☐ New Student - Eligibility (Racine)

☐ Applied for K4, KG, 01, 09

☐ Attended RUSD

☐ Was Prior RPCP Student

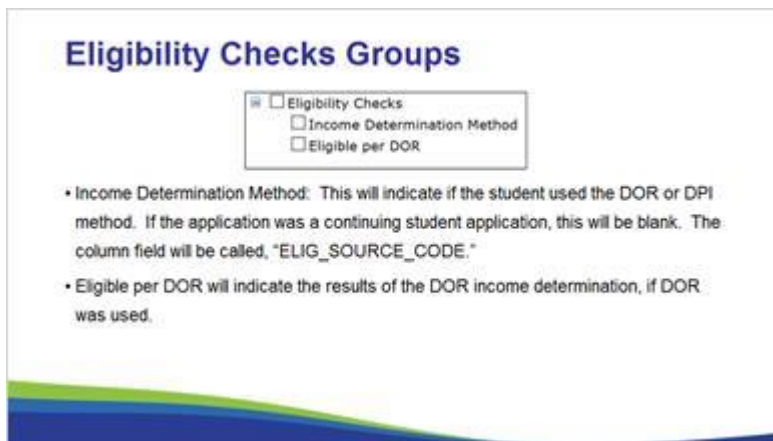
☐ Was Not Enrolled

☐ RUSD School Name

#### Notes:

The new student eligibility group provides which of the prior year attendance requirements RPCP and WPCP students met. Each student will have a “Y” or “N” identified for the first four items. Additionally, if the student met the prior year attendance requirement by attending a public school in the previous year, the name of the public school where the student attended in the prior year will be identified.

### 7-2.15 Eligibility Checks Groups



**Eligibility Checks Groups**

☒ ☐ Eligibility Checks

☐ Income Determination Method

☐ Eligible per DOR

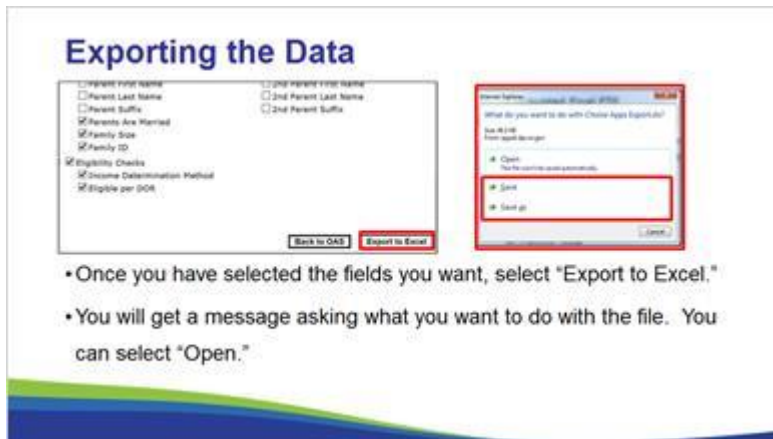
- Income Determination Method: This will indicate if the student used the DOR or DPI method. If the application was a continuing student application, this will be blank. The column field will be called, “ELIG\_SOURCE\_CODE.”
- Eligible per DOR will indicate the results of the DOR income determination, if DOR was used.

**Notes:**

The income determination method column will identify if the student used the DOR or DPI income determination method. If the application was a continuing student application and no new students were included on the same application, this will be blank. The column name will be, "ELIG\_SOURCE\_CODE."

Eligible per DOR indicates the results of the DOR income determination, if DOR was used.

### 7-2.16 Exporting the Data



The screenshot shows a web-based interface titled "Exporting the Data". On the left, there are two columns of checkboxes for selecting data fields. The first column includes: "1st Parent First Name", "1st Parent Last Name", "1st Parent Suffix", "Parents Are Married", "Family Size", "Family ID", "Eligibility Checks", "Income Determination Method", and "Eligible per DOR". The second column includes: "2nd Parent First Name", "2nd Parent Last Name", and "2nd Parent Suffix". Below these lists are two buttons: "Back to OAS" and "Export to Excel". To the right of the main interface, a smaller window titled "What do you want to do with 'Choice Apps Export.xls'?" is visible, showing options: "Open" (selected), "Save", and "Save as...".

- Once you have selected the fields you want, select "Export to Excel."
- You will get a message asking what you want to do with the file. You can select "Open."


**Notes:**

Once you have selected all of the fields you would like to include in the export, select "Export to Excel." You will receive a message asking what you want to do with the file. Generally, it is best to save the file on your computer first.



### 7-2.17 Opening the Data from OAS

**Opening the Data from OAS**



- Another pop up will show up in Excel. If you already have Excel open, the pop up may not come to the front of your screen.
- Go to Excel to see the pop up if it doesn't take you automatically there.
- Select "Yes".

#### Notes:

If you select "Open," another pop up will show in Excel. The pop up may not come to the front of the screen if Excel is already open. So, if you do not see the pop up right away, try going to Excel to view the pop up. Then select "Yes."

### 7-2.18 Field Interpretation

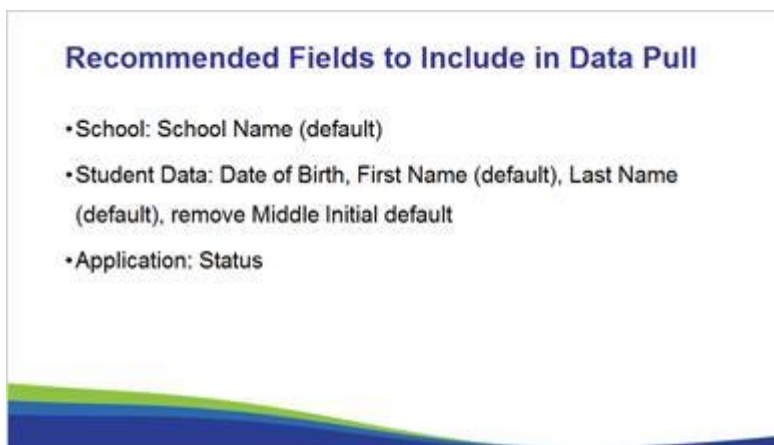
**Field Interpretation**

- The following are some fields where the header may be difficult to understand:
  - APPLICATION\_KEY=Application ID
  - APP\_ACCEPTED\_DATE=Date application received
  - FAMILY\_KEY=Family ID
  - ELIG\_SOURCE\_CODE=Income determination (eligibility) method

#### Notes:

The headers used in Excel will vary from the names in the OAS export. This slide lists some of the headers in the export that may be difficult to understand. They include the application ID, the date application received, the family id, and the income determination (eligibility) method.

### ***7-2.19 Recommended Fields to Include in Data Pull***



#### **Notes:**

Generally, you should include the school name and the student's date of birth, first name, last name, and application status in any export. The school name and the student's first and last name are checked by default. Date of birth is in the student group and status is under the applications group.



**Notes:**

If you have any questions about the information discussed in this training, please see the Private School Choice Programs homepage. The left menu bar of the Private School Choice Programs homepage has resources for both schools and parents.

Choice schools may also contact the Choice team at [privateschoolchoice@dpi.wi.gov](mailto:privateschoolchoice@dpi.wi.gov), or call the toll-free number at 1-888-245-2732, extension 3 with questions.